

CAGP ♦ ACPDP™

CANADIAN ASSOCIATION OF GIFT PLANNERS
ASSOCIATION CANADIENNE DES PROFESSIONNELS EN DONNS PLANIFIÉS

GIFT PLANNING – ALL IN A DAY

AGENDA

Welcome 8:00 a.m.

Overview – Philanthropic trends and tax issues

Break 10:00 a.m.

Bequests and Registered Funds

Charitable Life Insurance and Annuities

Lunch and Case Studies (12:30 – 1:45 p.m.)

Gift Planning Marketing

Talking to Donors 1 – Identifying and Cultivating

Break 3:30 p.m.

Talking to Donors 2 – Recognizing and Stewarding

Administering a Gift Planning Program.